Updating Approved Salary Plans on Position Overview

There are rare occasions when an agency seeks to extend the maximum salary limit on specific positions in order to recruit and retain incumbents. This Job Aid will address the process to update an Alternate Salary Plan and Grade on a Position.

Prior to DHRM changing the salary grade on a Position, the following steps will have been completed:

1. Agency HR identifies the need for an Alternate Salary Plan.
2. Agency HR requests DHRM approval of an Alternate Salary Plan, in writing to the DHRM Compensation Team for the respective Business Unit if none exists or an adjustment is required. Request shall include justification for the Alternate Plan, relevant pay factors, and contain a list of impacted positions.
3. DHRM approves or denies the Alternate Salary Plan.
4. If approved, DHRM will work with PPS to create the Alternate Salary Plan in Cardinal.
5. DHRM creates a help desk ticket to track the request.
6. PPS completes configuration of the new Alternate Salary Plan in Cardinal and updates the help desk ticket.
7. DHRM is notified of completion, verifies that the alternate salary plan is correct for the Business Unit and closes the help desk ticket.

After the above steps, the DHRM and Agency user will follow this Job Aid to complete the last three steps in the process:

1. DHRM updates the position(s) to reflect the new Alternate Salary Grade.
2. DHRM sends email to HR Agency to notify them of completion of the Alternate Salary Plan/Grade change.
3. Agency HR updates the Alternate Salary/Grade Table and Position(s) with step if applicable.
4. Update the incumbent's job record with the new compensation rate. For further information on Compensation Changes, see the Job Aid titled **HR351 How to Change Update Employee Compensation** Job Aid. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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DHRM Updates Position

After PPS configures the new Alternate Salary Plan, DHRM will update the Position.

1. Log into Cardinal using a DHRM HR Operations role.

2. Navigate to the **Position** page using the following path:

    Navigator > Organizational Development > Position Management > Maintain Positions Budget > Manage/Create Position

The **View Manage/Create Position Search** page displays.

3. Enter the applicable Position Number in the **Position Number** field.

4. Click the **Search** button.

The search results display in the bottom portion of the page.

5.   Select the applicable Position by clicking the corresponding row.

The **Position Details** page displays for the applicable Position.

6.   Click the **Add a New Row** icon (+) to make the change to the Position.

The **Request Details** page displays in a pop-up window.

7.   The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

Note: If a respective pay increase regarding this alternate grade is planned, ensure that the effective date is prior to the date of the compensation change.

8.   The **Effective Sequence** field will default to the next sequential number if other changes have been entered on the Position with the same effective date.

9.   Select "UPD" using the **Reason Code Look Up** icon.

10. Click the **Continue** button.

The **Manage Position** page displays with the **Position Data** Step displayed by default.

11.   Scroll down to the **Salary Plan Information** section.

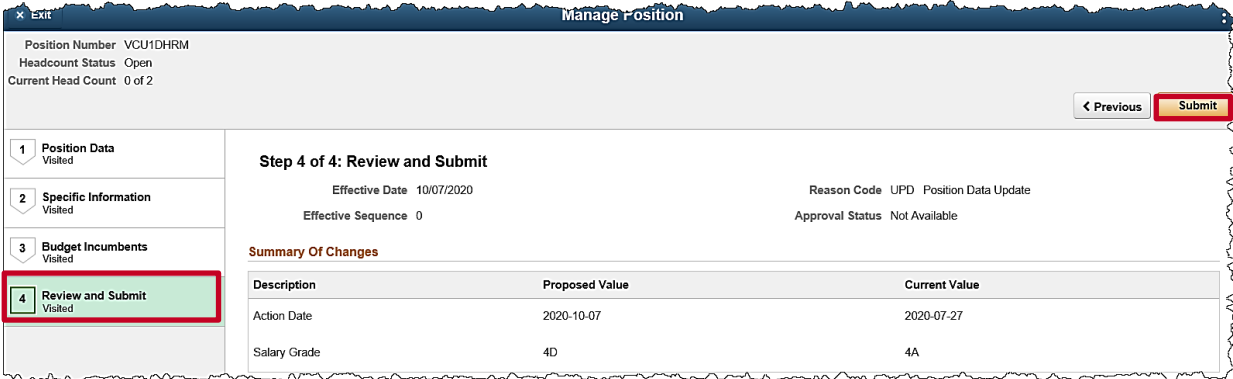The remaining sections display.

12.   Review the **Salary Admin Plan** field for the Position.

13.   Select the newly added Alternate Salary Plan/Grade value using the **Grade Look Up** icon.

14.   Click the **Review and Submit** tab in the navigation panel.

The **Review and Submit** Step displays.

15.   Review the changes made to the Position and then click the **Submit** button.

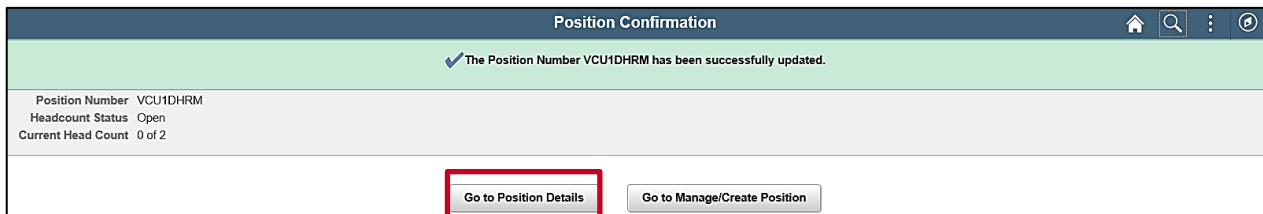If there are no incumbents in the Position, the following **Warning** displays.

16.   Click the **OK** button.

The **Position Confirmation** displays.

17.   Click the **Go to Position Details** button.

Agency HR Adds or Updates Steps to the Alternate Salary/Grade Table

Note: If your agency is using Salary Steps, follow instructions in the section below to make adjustments to current steps, or to add/remove salary steps. If your agency does not use steps, skip to page 13.

1. Log into Cardinal using an Agency HR Administrator role.

2. Navigate to the **Salary Grades** page using the following path:

   Navigator > Setup HCM > Product Related > Compensation > Base Compensation > Salary Grades

The **Salary Grades Search** page displays.

3. Enter the applicable Agency Set ID in the **Set ID** field.

4. Enter the applicable Alternate Salary Plan in the **Salary Administration Plan** field.

5. Enter the applicable Salary Grade in the **Salary Grade** field.

6. Click the **Search** button.

The **Salary Grades** page displays with the **Salary Grade Table** tab displayed by default.

7.   Click the **Salary Step Components** tab.

The **Salary Step Components** tab displays.

To add an additional step to an existing Salary Grade, continue with Step 8. To add steps to a new Salary Grade, continue with Step 18.

8. Click the **Add a Row** icon (+) within the **Salary Grade** section.
9. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

   Note: If a respective pay increase regarding this Alternate Grade/Step is planned, ensure that the effective date entered here is prior to the planned date of the pay increase.

10. Click the **Add a Row** icon (+) within the **Salary Step** section.
11. Enter the next sequential Step Number in the **Step** field.

12. Enter a description for the Step in the **Step Description** field. (i. e., Min Step amount or Max Step amount)
13. Select "STATE" using the **Rate Code Look Up** icon.
14. Enter the annual salary amount for the Step in the **Comp Rate** field.
15. The **Currency** field defaults to "USD".
16. Select "A" (Annual) using the **Frequency Look Up** icon.
17. Click the **Save** button.

    Note: If multiple steps are required, repeat Steps 8 – 17.

Note: If there is a need to add a step to a grade that has never reflected steps, continue to step 18.

18. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.
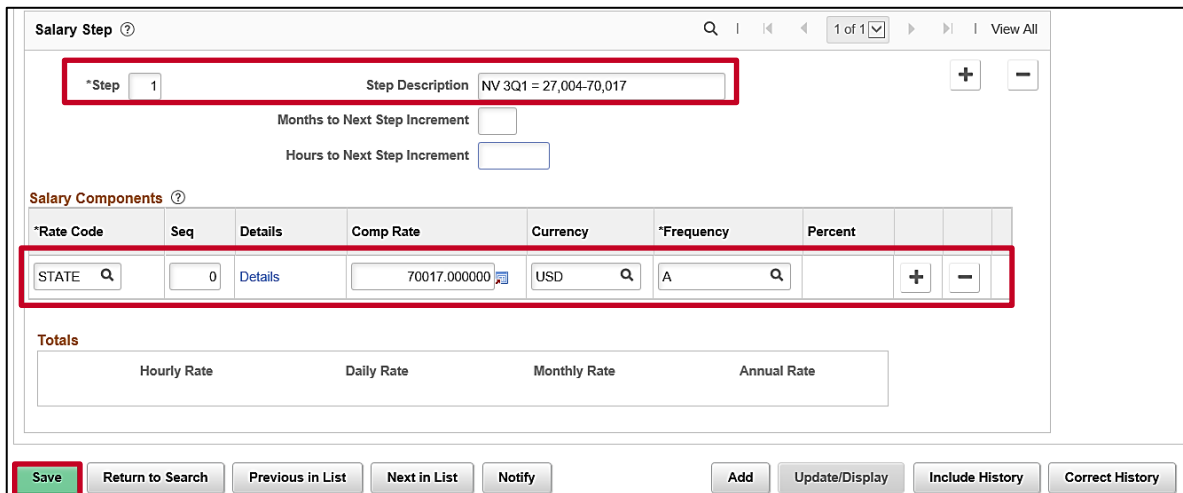
19. Enter a Step Number of "1" in the **Step** field.

20. Enter a description for the Step in the **Step Description** field.

21. Select "STATE" using the **Rate Code Look Up** icon.

22. Enter the annual salary amount for the Step in the **Comp Rate** field.

23. The **Currency** field defaults to "USD".

24. Select "A" (Annual) using the **Frequency Look Up** icon.

25. Click the **Save** button.

   Note: If multiple steps are required, refer to Steps 10 – 17 above.

Agency HR Updates Position

After DHRM updates the Position with the new Alternate Salary Plan and the Agency HR updates the Alternate Salary Plan/Grade table, the Agency HR will update the Position with the new Step in the Alternate Salary Plan.

> **Note**: If a change is made to a position that an employee currently occupies (incumbent) the next step would be to inserted into the affected job record and the compensation changed using the Pay Rate Change action code. See Job Aid titled **How to Change Updated Employee Compensation** for further details. This job aid can be found on the **Cardinal** website under **Learning**.

1. Log into Cardinal using an Agency HR Administrator role.

2. Navigate to the **View Manager/Create Position** page using the following path:

    Navigator > Organizational Development > Position Management > Maintain Positions Budget > Manage/Create Position

The **Manage/Create Position Search** page displays.

3. Enter the applicable Position Number in the **Position Number** field.

4. Click the **Search** button.

The search results display in the bottom portion of the page.

5. Select the applicable Position by clicking the corresponding row.

The **Position Details** page displays for the applicable Position.

6. Click the **Add a New Row** icon (+) to make the change to the Position.

The **Request Details** page displays in a pop-up window.

7. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

   Note: If a respective pay increase regarding this alternate grade is planned, ensure that the effective date is prior to the date of the compensation change.

8. The **Effective Sequence** field will default to the next sequential number if other changes have been entered on the Position with the same effective date.

9. Select the **Reason Code Look Up** icon to select the applicable reason for the change.

10. Click the **Continue** button.

The **Manage Position** page displays with the **Position Data** Step displayed by default.

11.   Scroll down to the **Salary Plan Information** section.

The remaining sections display.

   Note: The **Salary Admin Plan/Grade** fields are grayed out and can't be changed.

12.   Select the applicable Step using the **Step Look Up** icon.

The following page displays in a pop-up window.

13. Select the step required for the position update.

Once selected, the following displays at the top of the page.

Position Number	VCU1DHRM
Headcount Status	Open
Current Head Count	0 of 2

> Next >

14. Click the **Next** tab in the right hand corner of the page until the **Review and Submit** page is displayed.

The **Review and Submit Step** displays.

Position Number	VCU1DHRM
Headcount Status	Open
Current Head Count	0 of 2

< Previous   **Submit**

Step	Status
1 Position Data	Visited
2 Specific Information	Visited
3 Budget Incumbents	Visited
4 Review and Submit	Visited

Step 4 of 4: Review and Submit

Effective Date 06/14/2021   Reason Code UPD Position Data Update

Effective Sequence 2   0   Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Step	2	1

15. Review the changes made to the Position and then click the **Submit** button.

If there are no incumbents in the Position, the following **Warning** displays.

> Warning -- Update incumbents flag should be turned off for a position with no incumbents.
> Since this position doesn't have employees assigned to it, the Update Incumbents flag should be turned off. Uncheck the Update Incumbents checkbox on the Specific Information page
>
> OK   Cancel

16. Click the **OK** button.

The **Position Confirmation** displays.

Position Confirmation
✓ The Position Number VCU1DHRM has been successfully updated.

Position Number	VCU1DHRM
Headcount Status	Open
Current Head Count	0 of 2

Go to Position Details   Go to Manage/Create Position

Note: Update the incumbent's job record with the new compensation rate. For further information on How to Complete a Compensation Change, see the Job Aid titled **HR351 How to Change Update Employee Compensation** Job Aid. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.